

Petitioner Ulrich, Helen Joan (Pro Per – Mother – Petitioner)
 Petitioner Ulrich, Louis Eugene, II (Pro Per – Brother – Petitioner)
 Petitioner Hunt, Linda Lee (Pro Per – Sister – Petitioner)

Petition for Appointment of Successor Probate Conservator of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 3/14/16 Voting rights affected – need minute order.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 3/16/16	
			Updates:	
			Recommendation:	
			File 1- Ulrich	

2 Lee Offield aka Lee James Offield (Estate) Case No. 0316129**Attorney Shahbazian, Steven (for Larry Offield – Executor)****Status Hearing for Failure to File a First Account or Petition for Final Distribution.**

DOD: 07/27/1984	LARRY OFFIELD , was appointed Executor with full IAEA authority without bond on 09/11/1984.	NEEDS/PROBLEMS/COMMENTS: Minute Order of 01/13/2016: No appearance is necessary at the status hearing if the final Inventory and Appraisal and Petition are filed at least two court days prior. 1. Need First Account or Petition for Final Distribution.
	Letters issued on 09/14/1984.	
	Inventory and Appraisal, Partial No. 1 filed 09/26/1985 shows an estate valued at \$32,500.00.	
Cont. from 011316		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Final Inventory and Appraisal filed 03/22/2016 showing an estate valued at \$36,964.00	
	First Account and/or Final Distribution was due 11/1985.	
	Notice of Status Hearing filed 10/14/2015 set this Status Hearing for Failure to File a First Account and/or Petition for Final Distribution.	
	Status Report of Personal Representative filed 03/14/2016 states this probate matter had been commenced upon the death of the personal representative's father, Lee Offield, in 1984. At the time of his death, the decedent was separated from his spouse, Lora Offield, and was in a dissolution of marriage proceeding. The decedent's will dated 05/04/1984, was admitted to probate on 09/11/1984. That will left the decedent's entire estate to his son, Larry Offield, and his prior spouse (the mother of Larry) Estelle McAllister. The decedent's estranged spouse, Lora Offield, filed a "Petition for Determination of Entitlement to Distribution of Estate" and an action for "Family Allowance" against the estate. After litigation and negotiations, all claims of Lora Offield were settled and the parties entered into a "Compromised Settlement and Mutual Release." A "Judgement Determining Title to Distribution of Estate" was filed on 03/06/1986, resolving all claims between Lora Offield and the estate. The terms and conditions of that judgment have been complied with by the personal representative. Please see additional page	
		Reviewed by: LV
		Reviewed on: 03/18/2016
		Updates: 03/22/2016
		Recommendation:
		File 2- Offield

Continued from previous page:

In the process of administering the estate, the real property of which the decedent had a partial interest (25%) has been inventoried and appraised, the Inventory and Appraisement – Partial No. 1" was filed on 09/30/1985. In the interim, a beneficiary, Estelle McAllister, has died. The personal representative, Larry Offield, was Ms. McCallister's sole beneficiary under the terms of her will. As such, the personal representative is entitled to the entirety of the probate estate. After review of this original file in this matter, and conference with the personal representative, an "Inventory and Appraisement – Final" has been prepared for the remainder of the probate assets, being the decedent's interest, in a business (A&A Crane), with his son, Larry Offield, and miscellaneous personal property. The Inventory and Appraisal has been forwarded to the Probate Referee assigned to this matter (Steven Diebert). Upon the probate referee's completion of the appraisal, the estate will be in a condition to close. It is anticipated that a petition for final distribution should be filed within 90 days after completion of filing of the final inventory and appraisal.

Petition for Termination of Proceedings Due to Lack of Assets and Discharge of the Personal Representative.

DOD: 1/12/1989	DOLORES TRUJILLO , Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 2/17/16. Minute order states a status report needs to be filed 15 days before the hearing. – As of 3/15/16 no additional documents have been filed. 1. Petition alleges that at the time of the appointment on 1/16/1990 bond was not ordered. Order appointing Administrator dated 1/16/1990 ordered bond set at \$8,000.00. Bond of \$8,000.00 was filed on 1/17/1990. 2. Petition references Exhibits A & B in regards to the Fresno County Auditor Controller Treasurer Tax Collector sale. No Exhibits are attached to the petition. Please see additional page
Cont. from 012016, 021716	Petitioner states she and Mary Ellen Rodriguez were appointed as Administrators of the estate without any IAEA authority. Bond was not ordered at that time (see note #1).	
<input type="checkbox"/> Aff.Sub.Wit.	Co-Administrator Mary Ellen Rodriguez passed away on 6/6/1998.	
<input checked="" type="checkbox"/> Verified	Petitioner states despite efforts to sell the property in the estate and pay delinquent taxes, the home is now under the control of the Fresno County Auditor Controller Treasurer Tax Collector and is scheduled for sale in March 2016.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Petitioner prays for an Order:	
<input type="checkbox"/> Aff.Mail	1. Terminating the proceedings due to lack of assets.	
<input type="checkbox"/> Aff.Pub.	2. Discharging the personal representative.	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/16/16
		Updates:
		Recommendation:
		File 3B- Rodriguez

NEEDS/PROBLEMS/COMMENTS (cont):

3. The petitioner was appointed in 1990 and there was no activity in the estate until it was set for a status hearing in August 2014. The court may inquire why this estate has languished so long and if the personal representative has breached her fiduciary duty to in managing and controlling the estate with ordinary care and diligence. Probate Code §9600. The petition does not state how the real property was managed for 25 years. Was it vacant? Was it rented out? Was it listed for sale prior to 2014?

**First Account & Report of Successor Trustee of the Brooke Bertoldi Pooled
Special Needs Trust; Petition to Settle Account; to Decrease Bond; and to** **Fix**
& Allow Trustee Fees and Attorney Fees & Costs

		HERB THOMAS , Successor Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 11/18/14 – 11/30/15	
Cont. from 021716		Accounting - \$114,708.16	Continued from 2/17/16. As of 3/16/16 the following issues remain: 1. Trust agreement allows a 1,500.00 annual fee for trust administration. In addition the disbursement schedule includes monthly Trust Department fees totaling \$412.68 without additional explanation and Trust Account prep fee of \$143.75. It is unclear what the annual fee covers if the trust is also paying monthly fees for the administration of the trust. Court may require clarification.
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$ 51,005.26	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$ 43,833.34	
<input type="checkbox"/>	Inventory	Current Bond is \$129,000.00. Petition requests the bond be reduced to \$49,000.00 (o.k.)	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Trustee - \$212.50 (1.7 hours @ \$125.00 per hour)	
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.	Trust Administration fees - \$2,056.43 (already paid)	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Attorney - \$3,702.50 (per itemization and declaration. 11.70 hrs of paralegal time at \$150/hr and 6.7 hrs of attorney time at \$295/hr)	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Costs - \$416.11 (filing fees, FedEx)	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	Petitioner requests the authority to receive interim compensation going forward based on his current hourly rate, subject to Court confirmation, in an amount not to exceed \$1,000.00 annually.	
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Please see additional page			Reviewed by: KT Reviewed on: 3/16/16 Updates: Recommendation: File 4A- Bertoldi

Petitioner prays for an Order:

1. Approving, allowing and settling the First Account and Report of Successor Trustee;
2. Make and order decreasing the bond to \$49,000.00;
3. Authorizing and directing payment to Herb Thomas trustees fees totaling \$212.50;
4. Authorizing Trustee to receive interim compensation going forward based on his hourly rate, and subject to Court confirmation, in an amount not to exceed \$1,000.00 annually;
5. Authorizing attorney fees of \$3,702.50 and costs of \$416.11.

Note: If the petition is granted, status hearings will be set as follows:

- **Wednesday, April 27, 2016** at 9:00 a.m. in Department 303, for the filing of the reduced bond.
- **Wednesday, February 28, 2018** at 9:00 a.m. in Department 303, for the filing of the second account of successor trustee.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

Probate Status Hearing re: Proof of Notice to DMV

		<p>FREMONT BANK, former Trustee, petitioned the court for approval of their first and final account.</p> <p>HERB THOMAS is the current successor trustee.</p> <p>The first and final account showed that Fremont Bank as Trustee for the Trust purchased a handicap equipped van for the beneficiary and distributed the van directly to the beneficiary.</p> <p>Minute Order dated 6/29/15 states the court orders that the DMV is to be noticed that the Trust shall be the lienholder for the vehicle. Counsel is to submit a declaration verified by Herb Thomas.</p> <p>Former Status Report filed on 11/25/15 states Charities Pooled Trust (CPT) has been attempting to secure a lien on the vehicle, however it may not do so until the DMV issues and Electronic Lien Title (ELT). The DMV has informed CPT that the ELT will not be available until January 2016. Once the ELT is received they will be able to place CPT as a lienholder on the vehicle.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 3/14/16. Minute order states Counsel represents that the state recently issued the lien number, and the Trustee is in the process of registering the Trust with the lien number. The Trustee has been told by the DMV that they must attend training, and the Trustee is hoping to do that within the next two weeks.</p> <p>1. Need proof that the Trust is a lienholder on the vehicle or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 080315, 083115, 113015, 031416			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: KT</p> <p>Reviewed on: 3/16/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 4B – Bertoldi</p>	

4B

Probate Status Hearing for the Filing of the Increased Bond.

		CYNTHIA C. THOMAS and PAMELA J. THOMAS , are Co-Conservators.	NEEDS/PROBLEMS/COMMENTS:
		Co-Conservators' First Account for the account period ending 1/13/15 was approved on 12/11/15.	OFF CALENDAR. Additional bond of \$67,325.40 filed on 3/7/16
Cont. from 022416		Current bond is \$65,790.60.	
Aff.Sub.Wit.			
Verified		Order approving the accounting ordered the bond to be increased to \$133,035.00.	
Inventory			
PTC		This status hearing was set for the filing of the increased bond.	
Not.Cred.			
Notice of Hrg		Unverified Status Report filed on 2/18/16 states Petitioners request additional time to file the second account.	
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 3/16/16	
		Updates:	
		Recommendation:	
		File 5- Coyle	

Petition for Final Distribution and for Allowance of Compensation for Ordinary Services on Waiver of Detailed Accounting

DOD: 9/13/13		JENEbie LAZO and JEREMIAH RIBEIRO, Co-Administrators, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	
Cont. from		I & A - \$295,700.00	<p>1. Petition states no notice was required under Probate Code 9202(b), however beneficiary Jason Ribeiro was noticed of the initial petition for probate in a Federal Correctional Facility in Texas. If Jason has previously been confined to a prison or facility under the jurisdiction of the Department of Corrections and Rehabilitation notice would be required. Need clarification.</p> <p>2. Costs include \$1,480.00 in Court Call costs. Local Rule 7.17B.5 states the court considers telephonic appearances to be a part of the normal cost of doing business, and are not reimbursable. Examiner has interlineated the order to remove said costs.</p>
<input type="checkbox"/>	Aff.Sub.Wit.	POH - \$295,700.00	
<input checked="" type="checkbox"/>	Verified	Administrators - waive	
<input checked="" type="checkbox"/>	Inventory	Attorney (statutory) - \$8,914.00	
<input checked="" type="checkbox"/>	PTC	Costs - \$2,365.70 (publication, probate referee, certified copies and CourtCall)	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W/	
<input type="checkbox"/>	Aff.Pub.	Distribution, pursuant to intestate succession, is to:	
<input type="checkbox"/>	Sp.Ntc.	Jenebie Lazo - 1/3 interest in 2 parcels or real property, 1/3 interest in household furniture and furnishings, 1/3 interest in 1998 Saturn Wagon, 1/3 interest in 1990 Larson pleasure boat, 1975 Chevy Station Wagon, 1986 Toyota Van;	
<input type="checkbox"/>	Pers.Serv.	Jeremiah Ribeiro - 1/3 interest in 2 parcels or real property, 1/3 interest in household furniture and furnishings, 1/3 interest in 1998 Saturn Wagon, 1/3 interest in 1990 Larson pleasure boat, 1989 Subaru RX Coupe, 2005 Geely Motorcycle, 1988 Calke Trailer;	
<input type="checkbox"/>	Conf. Screen	Jason Ribeiro - 1/3 interest in 2 parcels or real property, 1/3 interest in household furniture and furnishings, 1/3 interest in 1998 Saturn Wagon, 1/3 interest in 1990 Larson pleasure boat, 1998 Toyota MR2 Coupe.	
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: KT
Reviewed on: 3/16/16
Updates:
Recommendation:
File 6- Ribeiro

		<p>SHARON KAYE SOVERN, Grandmother was appointed Conservator of the Person and Estate without bond (funds blocked) on 05/20/2014.</p> <p>Letters issued on 05/20/2014</p> <p>Receipt for Blocked Account in the amount of \$15,090.00 was filed 06/13/2014.</p> <p>Final Inventory and Appraisal filed 06/16/2014 shows an estate valued at \$15,090.00.</p> <p>An Order for Withdrawal of Funds from Blocked Account in the amount of \$1,039 for Ramos Furniture was filed 09/03/2014.</p> <p>An Order for Withdrawal of Funds from Blocked Account in the amount of \$415.00 for Optometrist was filed 03/23/2015.</p> <p>An Order for Withdrawal of Funds from Blocked Account in the amount of \$913.06 for Office Depot was filed on 12/14/2015.</p> <p>Minute Order of 12/14/2015 set this status hearing for the filing of the First Account.</p> <p>Declaration of Sharon Sovern In Re Statement of Account filed 02/17/2016 states:</p> <ul style="list-style-type: none"> • Opening Balance - \$15,090.43 • Deposits \$69.60 • Withdrawals \$1,430.06 • Balance as of 01/14/2016 \$12,725.19 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>OFF CALENDAR.</u> <u>First Account filed</u> <u>03/15/2016. Hearing is</u> <u>set for 05/02/2016.</u></p> <p>1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 021716			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: LV
Reviewed on: 03/18/2016
Updates:
Recommendation:
File 7- Graff

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD: 2/24/14	RACHELLE IRELAND , Daughter, was appointed Executor with Full IAEA without bond on 4/16/15. Letters issued 4/17/15.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 061215, 071515, 090915	At the hearing on 4/16/15, the Court set this status hearing re filing the first account or petition for final distribution.	Minute Order 9/9/15: Counsel reports that the Fresno home has sold and closed escrow, but the North Fork home is still listed, with little activity due in part to the issue with smoke in the area. Furthermore, she has received documents that were needed and will begin work on the First Accounting.
Aff.Sub.Wit.	Final I&A filed 5/16/14 indicates a total estate value of \$199,122.60.	As of 3/16/16, nothing further has been filed.
Verified	Supplemental I&A filed 7/29/14 indicates an additional asset valued at \$43,919.00.	
Inventory	Various receipts have been filed in connection with distribution of misc. personal effects.	
PTC	Various creditor's claims have also been filed.	
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Status Hearing Report filed 7/13/15 states on 6/16/15, she spoke on the phone at length with Realtor Russell Smith about the listing of the North Fork rental property. The sale price was recently reduced from \$105,000 to \$98,000, and there is an \$81,000 mortgage on the property. Mr. Smith stated that the wooden post holding the sale sign has been stolen several time, and that the neighborhood is not good. The house cannot qualify for an FHA loan so they are not reaching a majority of qualified buyers. Most homes sell in the summertime due to people looking for vacation homes, but there has been a decrease in tourism and activity the past couple of years.	1. Need First Account or Petition for Final Distribution or current written status report per Local Rule 7.5.
Letters	There were several evacuations due to forest fires and fire insurance rates have risen significantly.	
Duties/Supp	There are a couple of other listings in the area that have been on the market for over three years in better condition.	
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice	The estate cannot close until both properties are sold, so Attorney Horton requests continuance for 60 days for further status.	
		Reviewed by: skc
		Reviewed on: 3/16/16
		Updates:
		Recommendation:
		File 8- Stafford

Petition for Special Immigrant Juvenile Findings

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. The Court may require Notice of Hearing and proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Cal. Rule of Court 7.1020, Probate Code §1460 on the ward Benjamin Escobar Rodas and the parents.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	X		
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 3/16/16	
			Updates:	
			Recommendation:	
			File 9- Rodas	

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 4/3/15		<p>LINDA P. MCCLOUD, former spouse, was appointed Administrator with Will Annexed, with bond of \$1,883,274.00 on 10/6/15.</p> <p>Bond was filed and Letters issued on 10/22/15.</p> <p>At the hearing on 10/6/15, the Court set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>OFF CALENDAR</p> <p>Corrected Final I&A filed 3/22/16</p>
Cont. from 021016			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 3/16/16</p> <p>Updates: 3/22/16</p> <p>Recommendation:</p> <p>File 10- McCloud</p>	

Petition for Final Distribution on Waivers of Accounting and for Allowance of

Requested Fees to Attorney

DOD: 5/3/15	JAMIE MORITA , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.	
	I & A - \$185,000.00	
Cont. from	POH - \$185,000.00	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Executor - waives	
<input checked="" type="checkbox"/> Inventory	Attorney - \$5,000.00 (less than statutory)	
<input checked="" type="checkbox"/> PTC		
<input checked="" type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Distribution, pursuant to decedent's will and assignment of interest, is to:	
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.	Angela Morita - real property	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters	10/13/15	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input checked="" type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input checked="" type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/17/16
		Updates:
		Recommendation: SUBMITTED
		File 11- Janian

Petition for Appointment of Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 2/17/16</u> : Examiner notes given. The following issues remain: 1. Petitioner filed a declaration of due diligence re the father on 1/14/16. If diligence is not found, need notice per Probate Code §1511. 2. Notice of Hearing filed 11/17/15 does not indicate that a copy of the petition was included with service on maternal grandmother Denice Franklin. The Court may require further service. 3. Need service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Paternal Grandfather - Paternal Grandmother - Maternal Grandfather
Cont. from 121615, 021716				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w/o		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	w		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	DSS Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: skc
				Reviewed on: 3/16/16
				Updates:
				Recommendation:
				File 13 - Franklin

14

Audrina Rivera (GUARD/P)**Case No. 15CEPR01033**

Petitioner Rivera, Tony (pro per – paternal grandfather)
 Petitioner Rivera, Lupe (pro per – paternal grandmother)
 Mother Botello, Josette (pro per – objector)

Petition for Appointment of Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 2/17/16:</u> Father is not allowed to live in the house with petitioners. Examiner notes given. <u>Minute Order 12/16/15:</u> The Court orders the Court Investigator to do further investigation with respect to Josette Botello's fitness to have the minor returned to her and provide a supplemental report to the Court. The Court orders reasonable visitation for Josette Botello for 2 hours per week, as mutually agreed upon by all parties as to days, times, and place.	
Cont. from 121615, 021716				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w/
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
✓	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: JF/skc	
			Reviewed on: 3/17/16	
			Updates:	
			Recommendation:	
			File 14 – Rivera	

14

Petition for Appointment of Guardian of the Estate

		See petition for details.	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note:</u> Pursuant to Local Rule 7.8, it is the policy of the Court to block all funds in guardianship estates. Petitioner is encouraged to review Local Rule 7.8 in its entirety, including 7.8.1A-I (General Provisions), 7.8.2A-B (Accounting Requirements), and 7.8.3A-D (Withdrawals).</p> <p><u>Note:</u> All notice issues have been cured. The following remains noted for reference:</p> <p>1. This petition was filed with a fee waiver; however, upon receipt of funds, the filing fee of \$435.00 may be due.</p> <p><u>Note:</u> If granted, the Court will set status hearings as follows:</p> <ul style="list-style-type: none"> Wednesday, May 4, 2016 for the filing of the Receipt for Blocked Account (Form MF-356); Wednesday July 20, 2016 for the filing of the Inventory and Appraisal pursuant to Probate Code §2610; and Wednesday, May 24, 2017 for the filing of the First Account. <p>If the proper items are on file prior to the status dates pursuant to Local Rule 7.5, the status hearings may come off calendar.</p>	
Cont. from 021016				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
<p>Reviewed by: skc</p> <p>Reviewed on: 3/16/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15- Gonzalez</p>				

Petition for Appointment of Guardian of the Person

	See petition for details.		NEEDS/PROBLEMS/COMMENTS:
			Minute Order 2/16/16: Examiner notes given.
			1. If diligence is not found, need personal service of Notice of Hearing and proof of service at least 15 days prior to the hearing per Probate Code §1511 on: - Naomi Villanueva (Mother) (Personal service) - Rafael Luis Muriel (Maternal Grandfather)(Mail or personal service)
Cont. from 021616			
	Aff.Sub.Wit.		2. The Notice of Hearing filed 3/8/16 does not reflect that a copy of the petition was included with the service on Eloise Logan (paternal grandmother) and Darrian Rodriguez (sibling). (Box not checked at #5.) The Court may require clarification or further service.
✓	Verified		
	Inventory		Reviewed by: JF/skc
	PTC		
	Not.Cred.		Reviewed on: 3/17/16
✓	Notice of Hrg		Updates:
✓	Aff.Mail		Recommendation:
	Aff.Pub.		File 16- Villanueva
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

DOD:11/01/2015	CAROL M. SMILEY , niece, is petitioner and requests appointment as Administrator with Will Annexed and bond set at \$445,000.00.		NEEDS/PROBLEMS/COMMENTS:
			Note: If the petition is granted status hearings will be set as follows:
Cont. from			<ul style="list-style-type: none"> • Wednesday, 04/20/2016 at 9:00a.m. in Dept. 303 for the filing of the bond <u>and</u>
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA – o.k.		
<input checked="" type="checkbox"/> Verified	Holographic Will dated: 10/23/2010		Wednesday, 09/21/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u>
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC	Residence: Fresno		<ul style="list-style-type: none"> • Wednesday, 05/24/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.
<input type="checkbox"/> Not.Cred.	Publication: The Business Journal		
<input checked="" type="checkbox"/> Notice of Hrg	Estimated Value of the Estate:		Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
<input checked="" type="checkbox"/> Aff.Mail	w/	Personal property - \$331,950.00	
<input checked="" type="checkbox"/> Aff.Pub.		Real property - \$110,000.00	Reviewed by: LV Reviewed on: 03/18/2016 Updates: 03/22/2016 Recommendation: File 17- Williams
<input type="checkbox"/> Sp.Ntc.		Total - \$441,950.00	
<input type="checkbox"/> Pers.Serv.	Probate Referee: Steven Diebert		
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

		SCOTT A. MURPHY and DAWN R. MURPHY , parents, were appointed Co-Guardians of the Estate, with all funds to be placed in a blocked account on 03/01/2016.	NEEDS/PROBLEMS/COMMENTS:
		Letters issued 03/02/2016.	1. Need Receipt for Blocked Account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from		Minute Order of 02/22/2016 set this Status Hearing for the filing of the Receipt for Blocked Account.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LV
			Reviewed on: 03/18/2016
			Updates:
			Recommendation:
			File 18- Murphy

Petition for Letters of Administration; Authorization to Administer Under IAEA

DOD: 11/23/2015	MARTIN NAVARRO , relationship to decedent unknown, is petitioner and requests appointment as Administrator without bond.		NEEDS/PROBLEMS/COMMENTS: Note: If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> Tuesday, August 23, 2016 for filing Inventory and Appraisal Tuesday, May 23, 2017 for filing the first account or petition for final distribution
Cont. from	All heirs nominate petitioner and waive bond		
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified	Full IAEA – o.k.		
<input type="checkbox"/> Inventory	Decedent died intestate		
<input type="checkbox"/> PTC	Residence: Clovis, CA Publication: Business Journal		
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/	Estimated value of Estate:	
<input checked="" type="checkbox"/> Aff.Pub.		Personal property \$ 300,000.00	
<input type="checkbox"/> Sp.Ntc.		Annual gross income: \$ 0.00	
<input type="checkbox"/> Pers.Serv.		Real property: \$ 0.00	
<input type="checkbox"/> Conf. Screen		Total: \$ 300,000.00	
<input checked="" type="checkbox"/> Letters		Probate Referee: Steven Diebert	
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

Reviewed by: SEF
Reviewed on: 3/16/2016
Updates: 3/21/2016
Recommendation: SUBMITTED
File 19- Silva

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 12/27/2015		PAUL LAWRENCE DAVIS, brother/named executor without bond, is petitioner	NEEDS/PROBLEMS/COMMENTS: Continued to 5/4/2016 per amended petition filed 3/22/16 Need amended petition based on the following: 1. Paul Lawrence Davis is listed as petitioner. However, the petition, duties and confidential supplement to the duties are all signed as " <i>Larry Davis</i> ". The signature of the petitioner must match the name on the pleadings. 2. Item 1 of <i>Letters</i> lists Larry Davis as Executor and is signed by Larry Davis. Petition and order requests Paul Lawrence Davis be appointed Executor. The name on the <i>Letters</i> must match the name on the order. 3. Item 3e(2) of the petition indicates a copy of decedent's Will dated 8/28/1980 is attached to the petition; however, no copy of the Will is attached as required pursuant to Probate Code 8002(b)(1). 4. Item 3e(2) of the petition lists decedent's Will dated 8/28/1980 and Order requests Will dated 8/28/1980 be admitted to probate. Presently, decedent's only Will on deposit with this court (deposited on 1/6/2016) is dated 8/27/1980. Please see additional page 2.
		Petitioner is a resident of West Allis, Wisconsin	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Full IAEA – o.k.	
<input type="checkbox"/>	Inventory	Will dated 8/28/1980	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.	Residence: Fresno	
<input checked="" type="checkbox"/>	Notice of Hrg	Publication: Fresno Business Journal	
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Estimated value of Estate: Personal property \$ 5,000.00 Annual gross income: \$ 0.00 Real property: \$ 75,000.00 Total: \$ 80,000.00	
		Probate Referee: Rick Smith	
		Reviewed by: SEF	
		Reviewed on: 3/16/2016	
		Updates: 3/22/2016	
		Recommendation:	
		File 20- Davis	

NEEDS/PROBLEMS/COMMENTS (continued):

5. Proposed personal representative is a resident of Wisconsin. Probate Code 8571 states notwithstanding a waiver of bond, the Court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the Court.

Note: If granted, the Court will set status hearings as follows:

- **Tuesday, August 23, 2016** for filing Inventory and Appraisal
- **Tuesday, May 23, 2017** for filing the first account or petition for final distribution

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 9/1/2015	DAMON C. GARY , stepson/named beneficiary, is petitioner and requests BRANDON K. GARY (named Executor in Will) be appointed Executor without bond	NEEDS/PROBLEMS/COMMENTS: Will does not appear to be valid based on the following: 1. The Will is not signed by the testator as required pursuant to Probate Code 6110. 2. Item 3e(2) of petition refers to decedent's Will dated <u>5/9/14</u> . The copy of the Will attached to the petition is interlineated at the top with the date 5/9/14 and is initiated by "rgg" (decedent's initials). However, the date of execution at the bottom of the Will states it was executed (by decedent) on <u>5/15</u> (no year is listed), which is 6 days after the Will was interlineated. 3. The subscribing witnesses declared on <u>3/15/2014</u> (2 months prior to the date next to the subscribing witnesses' signatures of <u>5/15/2014</u>), that the instrument was decedent's Will and that decedent signed the Will in the witnesses' presence. However, the Will is not signed by the decedent. 4. Item 8 of petition does not list Susan Bellusci (sister), named alternate executor, as required. <p style="text-align: center;">Please see additional page 2.</p>
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	Will waives bond	
<input checked="" type="checkbox"/> Verified	Full IAEA – need	
<input type="checkbox"/> Inventory	Will dated 5/9/2014	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Residence: Fresno	
<input type="checkbox"/> Notice of Hrg	Publication: <u>Fresno Bee</u>	
<input type="checkbox"/> Aff.Mail		
<input checked="" type="checkbox"/> Aff.Pub.	Estimated value of Estate:	
<input type="checkbox"/> Sp.Ntc.	Personal property \$ 16,400.00	
<input type="checkbox"/> Pers.Serv.	Annual gross income: \$ 0.00	
<input type="checkbox"/> Conf. Screen	Real property: \$ 92,834.00	
<input checked="" type="checkbox"/> Letters	Total: \$ 109,234.00	
<input checked="" type="checkbox"/> Duties/Supp	Probate Referee: Steven Diebert	
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: SEF
		Reviewed on: 3/16/2016
		Updates: 3/22/2016
		Recommendation:
		File 21- Goodstein

NEEDS/PROBLEMS/COMMENTS (continued):

5. ~~Need Notice of Petition to Administer Estate.~~ Filed 3/22/2016.
6. Need proof of service 15 days prior to hearing of the *Notice of Petition to Administer Estate* on the following:
 - a. ~~Brandon K. Gary (stepson/named executor)~~
 - b. Susan Bellusci (alternate executor)

Probate Code 8110(b) requires notice to each alternate executor named in any will being offered for probate.
7. ~~Need proof of publication.~~ Filed 3/22/2016; now o.k.

Note: If granted, the Court will set status hearings as follows:

- **Tuesday, August 23, 2016** for filing Inventory and Appraisal
- **Tuesday, May 23, 2017** for filing the first account or petition for final distribution

Petition to Determine Succession to Real and Personal Property

DOD: 8/23/2015	STARLA R. SCHLETEWITZ and JACOB H. SCHLETEWITZ , daughter and son, are petitioners	NEEDS/PROBLEMS/COMMENTS:
	40 days since DOD	
Cont. from	No other proceedings	
<input type="checkbox"/> Aff.Sub.Wit.	I&A - \$144,639.96	
<input checked="" type="checkbox"/> Verified	Decedent died intestate	
<input checked="" type="checkbox"/> Inventory	Petitioners request Court determination that decedent's 100% interest in real property located at 812 Alamos Avenue, Clovis CA and personal property consisting of 218 shares of Verizon communications stock, pass to them pursuant to intestate succession as follows:	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters	Starla R. Schletewitz (50%) Jacob H. Schletewitz (50%)	
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: SEF
		Reviewed on: 3/16/2016
		Updates:
		Recommendation: SUBMITTED
		File 22- Schletewitz

DOD: 11/12/2015	EDWARD HENRY NUNN , spouse is petitioner and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS:
		1. Need Waivers of Bond on Mandatory Judicial Council Form or in the alternative, Bond set at \$55,960.00.
	Full IAEA – o.k.	
Cont. from	Decedent died intestate	<p><u>Note:</u> If the petition is granted status hearings will be set as follows:</p> <p>• Wednesday, 04/20/2016 at 9:00a.m. in Dept. 303 for the filing of the bond (if the Court orders bond) <u>and</u></p> <p>Wednesday, 09/21/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u></p> <p>• Wednesday, 05/24/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.</p> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
<input type="checkbox"/> Aff.Sub.Wit.	Residence: Fresno	
<input checked="" type="checkbox"/> Verified	Publication: The Business Journal	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Estimated value of the Estate:	
<input checked="" type="checkbox"/> Notice of Hrg	Real property - \$90,000.00	
<input checked="" type="checkbox"/> Aff.Mail	Less encumbrances - \$34,040.00	
<input checked="" type="checkbox"/> Aff.Pub.	Total - \$55,960.00	
<input type="checkbox"/> Sp.Ntc.	Probate Referee: Steven Diebert	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 03/21/2016
		Updates:
		Recommendation:
		File 23- Nunn

24 Robert J. Hixon, JR (Estate)**Case No. 16CEPR00164****Attorney Rindlisbacher, Curtis D. (for Bradford W. Hixson & Brian R. Hixson – Petitioners – Nephews)****Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under the IAEA**

DOD: 02/02/2016		BRADFORD W. HIXSON, and BRIAN R. HIXSON , nephews/named Co-Executors without bond are petitioners. Full IAEA – o.k. Will dated: 05/16/1991 Codicil dated: 05/23/1995 Residence: Reedley Publication: The Reedley Exponent <u>Estimated value of the Estate:</u> Personal property - \$10,000.00 Real property - \$3,500,000.00 Total - \$3,510,000.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: 1. Need proof of service of the Notice of Petition to Administer Estate on Nadyne Horton pursuant to Probate Code §8110 unless the Court dispenses with notice. Note: Declaration of Due Diligence filed 03/07/2016. <u>Note: If the petition is granted status hearings will be set as follows:</u> • Wednesday, 09/21/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday, 05/24/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			s/p
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: LV	
Reviewed on: 03/21/2016	
Updates:	
Recommendation:	
File 24- Hixon	

Petitioner

Rios, Susan (Pro Per – Sister – Petitioner)

Attorney

Wright, Janet (Court appointed for Proposed Conservatee)

Petition for Appointment of Probate Conservator of the Person

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			Court Investigator advised rights on 3/9/16
			1. Need Confidential Supplemental Information Form GC-312.
			2. It appears relatives are omitted from the list provided at #11 of the petition. Need <u>complete</u> list of all relatives within the second degree, with dates of death if deceased per Local Rule 7.1.1.D.
			3. Petitioner did not include the mandatory Judicial Council Form GC-313 Attachment Requesting Special Orders Re Dementia, which clarifies whether the petitioner is seeking medication and/or placement powers. This attachment must be filed and served with the petition on the proposed Conservatee and all relatives.
			4. Need Citation and personal service of Citation with a copy of the petition at least 15 days prior to the hearing per Probate Code §1824 on Proposed Conservatee Ruth Shaffer.
			5. Need Notice of Hearing and proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1822 on all relatives.
			6. Need video receipt per Local Rule 7.15.8.A.
			7. Need Capacity Declaration in support of dementia powers, if requested.
			Reviewed by: skc
			Reviewed on: 3/17/16
			Updates:
			Recommendation:
			File 25- Shaffer

	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	X
	Aff.Mail	X
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	X
✓	Conf. Screen	X
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	X
✓	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	X
	FTB Notice	

Petitioner

Bonillas, Marie A. (Pro Per – Daughter – Petitioner)

Attorney

Janisse, Ryan (Court appointed attorney for Proposed Conservatee)

Petition for Appointment of Probate Conservator of the Person and Estate

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			Court Investigator advised rights on 3/14/16
			If this petition goes forward:
<input type="checkbox"/>	Aff.Sub.Wit.		1. Need Court Investigation pursuant to Probate Code §1826.
<input checked="" type="checkbox"/>	Verified		2. Need citation and service on proposed Conservatee per Probate Code §1824.
<input type="checkbox"/>	Inventory		3. Need Notice of Hearing and service on all relatives and office of veterans administration per Probate Code §1822.
<input type="checkbox"/>	PTC		4. Need video receipt per Local Rule 7.15.8.A.
<input type="checkbox"/>	Not.Cred.		5. Need capacity declaration in support of medical consent and dementia powers.
<input checked="" type="checkbox"/>	Notice of Hrg		<u>Upon further review, there may be additional issues.</u>
<input checked="" type="checkbox"/>	Aff.Mail	W	Reviewed by: skc
<input type="checkbox"/>	Aff.Pub.		Reviewed on: 3/17/16
<input type="checkbox"/>	Sp.Ntc.		Updates:
<input type="checkbox"/>	Pers.Serv.	X	Recommendation:
<input checked="" type="checkbox"/>	Conf. Screen		File 26- Bonillas
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	X	
<input checked="" type="checkbox"/>	CI Report	X	
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation	X	
<input type="checkbox"/>	FTB Notice		

Petitioner Maria Cruz Almeraz Nava (Pro Per – Paternal Great-Grandmother – Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 3/9/16:</u> Examiner notes and clinic information provided in open court. The Court indicates that it will terminate the temporary orders on 3/23/16 if the mother has not been properly noticed. <u>Note:</u> The mother has now been served.	
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	FTB Notice			
		Reviewed by: skc		
		Reviewed on: 3/16/16		
		Updates: 3/17/16		
		Recommendation:		
		File 27- Brown/ Haro		

Petitioner: James R. Doughty II (pro per)

Attorney: Julia A. Brungess (for Guardians Roy Oken and Doreen Oken)

Motion - Child Visitation

		JAMES R. DOUGHTY, II , father, is petitioner.	NEEDS/PROBLEMS/COMMENTS: This matter will be heard in Department 54 at 8:30 a.m. 1. Petition was not verified. Probate Code §1021.
		ROY OKEN and DOREEN OKEN , maternal grandparents, granted guardianship of the minor on 4/1/2008.	
		Please see petition for details.	
		Objection to Visitation filed by Guardians Roy Oken and Doreen Oken on 3/14/16.	
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FTB Notice			
			Reviewed by: KT
			Reviewed on: 3/17/16
			Updates:
			Recommendation:
			File 1- Doughty